

## Draft and Issue a Solicitation

### Welcome and Introduction

#### Welcome

Welcome to the Draft and Issue a Solicitation Training. In this module, we'll provide an overview of what to include in a well-written solicitation, as well as some best practices for managing solicitation responses.

If you'd like information on how to navigate this course, please select the Navigation Tutorial button. Otherwise, select the next arrow to begin.

#### Navigation

To get started, make sure your audio is turned on. This learning experience is primarily audio-driven. To move backward and forward in the module, select the next and back arrows. Want to see something again? Select the refresh button. Need to pause the module? Select the play/pause button. You can also navigate to a different section in this course by selecting the menu tab at the top of the screen.

So, let's get started. Select the next arrow to continue.

#### Course Objectives

By the time you've completed this course, you should be able to:

- Develop a scope of work and bid specification, and
- List the components to include in a solicitation.

You should also be able to:

- Issue a well-written solicitation, and
- Solicit and manage responses in accordance with procedures.

To follow along with the module, consider downloading the Procurement Toolkit in the Additional References section of the course.

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## Meet Amy

Hi and welcome to our Weatherization agency. My name is Amy, and I'm a fiscal manager. I'm glad you stopped by, because I could really use your help. Our field staff have their hands full with their current workload, and I've been put in charge of drafting and issuing a solicitation for an insulation job that needs to be complete by the end of this year.

I know that completing this task involves preparing the instructions and bid specifications, as well as advertising the solicitation and conducting a bidders' conference.

I'm just not sure where to start. What should be included in a well-written solicitation?

## Developing the Scope of Work and Bid Specifications

### Well-Written Solicitations

First, let's look at what is most commonly included in a well-written solicitation. Select Amy's colleague to learn more.

Well-written solicitations are complete, yet concise documents that use straightforward language, while containing only the necessary information. This includes details about the scope of work, general requirements, eligible costs, procurement schedules and key dates, the expected contract period, selection criteria, minimum and preferred qualifications, terms and conditions and submission requirements.

### General Instructions

Well-written solicitations also include clear and concise general instructions that contain information about the agency's requirements and rules for providing weatherization services and materials. These same general instructions can be used for all solicitations.

To see more about what is commonly included in general instructions, select the Information icon.

### Drafting Amy's Scope of Work

Now that Amy has a solid set of general instructions that can be included with all solicitations, she is drafting the scope of work for this one. She has pulled two samples to draw from. She's noticed some issues with one of them that have caused her to question whether these are both well-written samples. Can you help her determine which sample is the well-written Scope of Work? Select each **Solicitation** button below to review the document. If you feel it's well-written, drag it to the Well-Written box over Amy's portfolio and select Submit.

### Key Elements of an SOW

Now that Amy has reviewed some samples, she is ready to draft her scope of work. The SOW is a clear and accurate description of the technical requirements for the equipment or materials needed and the type of service to be procured. When drafting the SOW, Amy should follow her Grantee's guidelines and disclose all required elements in her bid package so that there are open and fair opportunities for all qualified bidders.

Select each tab to help Amy identify what should be included in her SOW. Then, choose each icon to see more about the key elements of a well-written SOW.

A. The SOW should clearly explain that all materials used in the provision of services must conform with 10 CFR 440 Appendix A: "Standards for Weatherization Services"

B. The preparation of the specifications is the most important component of any solicitation to make sure that Amy's agency receives the services or materials that they want, in the timeframe that they need it, and at the best possible price. Every material in the bid package has to have a specification that includes details about the performance expectations. When preparing the specifications, as mentioned in 2 CFR 200.319 remember to avoid being too specific or prescriptive with the details. When too specific, you might not learn about other appropriate materials that may be better. However, keep in mind that there are also times when you need to be specific so all selected subcontractors are using the same equipment and materials.

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C. When hiring subcontractors, include a reference to the relevant Standard Work Specifications or Grantee's Field Guide in the SOW. The Standard Work Specifications are a major component of the Guidelines for the Home Energy Professionals project, and define the minimum requirements to make sure that the work performed during home energy upgrades is effective, durable, and safe.

D. Provide specific details about what the agency is purchasing or procuring.

E. State the timeframe for the completion of the work.

F. Include a table for pricing quotes. This makes comparing bids easier.

### **What Do You Think?**

Thanks for helping me to explore the key elements of the Scope of Work. I am ready to put together the rest of the solicitation. What components should be included in the requirements for solicitation responses?

What do you think? Can you help Amy identify these components? Select each of the requirements that apply and choose Submit. If you need help, select the Ask a Colleague button.

## **The Pitfalls of Poorly Written Statements of Work**

### **Potential Solicitation Pitfalls**

Earlier we identified an example of a well-written scope of work, as well as one that lacked important details. What could happen if your solicitation does not provide the right information to bidders?

### **Potential Solicitation Pitfalls (Part 2)**

Amy's colleagues have experienced challenges with solicitations in the past. Move the slider to each person to learn more about what could happen if solicitations are not drafted according to the practices we have discussed.

### **What Do You Think? (Part 1)**

What do you think? Amy's agency issued an invitation for a bid for insulation work on one of the home's they're weatherizing. Not long after the contractor was selected and scheduled to start work, the contractor's project manager contacted the Director to tell him he wouldn't be able to perform the work as scheduled. Based on the excerpt from the scope of work, what is the most likely reason for the delay? Choose a response and select Submit.

### **What Do You Think? (Part 2)**

Now let's suppose that, to avoid production shortfalls, an agency called for a contractor to weatherize 300 units, when in reality the target was 100 units. Two subcontractors were awarded the contract, and all of the work was completed in the first half of the contract period. What is the most likely cause of this? Choose a response and select submit.

### **Improving Scopes of Work**

Earlier we looked at the differences between two scopes of work. What would happen if I did not send the BEST example to potential bidders?

In the previous example, the scope of work could have been improved by providing a realistic estimate of the work, but not an exact amount. Remember to include the requirements for work quality and work specifications, as well as worker skills and certifications. Also, be sure to refer to the Grantee's standards, which are based on the SWS and make the field guide available. Lastly, don't forget to draw attention to the requirements that would be considered more stringent or specific to WAP compared to other contractor standards.

### **Outreach Opportunities**

Now that we've helped Amy draft her solicitation, she is ready to distribute to potential bidders! At this point she should follow the Grantee-approved procedures for her agency on the distribution of solicitations.

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She'll also need to...

- Advertise in local online and print periodicals,
- Post flyers in public places where subcontractors are likely to view them (including in building departments),
- Email the prior bidders list upon the release of the solicitation,
- Post on the agency's website,
- Email the agency-wide distribution lists, and
- Host a local or virtual bidders' conference, where she can respond to all her bidder's questions.

### **Documenting Outreach Efforts**

As Amy issues her solicitation, she'll need to document ALL outreach efforts in accordance with her Grantee and agency's procedures.

To see more about the ways Amy can document her outreach efforts, select each of the icons.

### **Key Takeaways**

Thanks again for all of your help today. We've covered a lot of information. Before you go, let's review a few of the key takeaways.

First, well-written solicitations contain general instructions, clear and concise scopes of work, and requirements for responses.

Second, solicitations should be detailed without being prescriptive. Follow Grantee-approved procedures on the distribution of solicitations to help generate sufficient responses.

Lastly, be sure to document all outreach efforts in accordance with your procedures.

### **Congratulations**

Nicely done! You have successfully helped Amy draft and issue her solicitation. As a result, she was able to recruit the most qualified candidates for her job and complete the work by her deadline. Moving forward, consider what steps you will take to create well-written statements of work, and the opportunities that you have to find and recruit qualified bidders.

Continue learning about procurement by checking out our additional training on selecting and managing subcontractors. Visit the additional references section of the course for more information.

When you're ready, you may close your browser window to exit.



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